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## Strategy Workbook Outline

### 1.0 Purpose of Workbook

The purpose of this workbook is to guide the development and implementation of a policy initiative to improve {Insert Public Health Issue}. Information presented in this workbook is based on findings from:

- Literature review
- Interviews with Beneficiaries
- Interviews with Stakeholders
- Interviews with Decision-makers

A social marketing framework will be used to guide discussion of the information summarized in the workbook and make a set of strategic marketing decisions. The resulting Policy Enactment Plan will provide strategies to:

- Objective 1
- Objective 2
- Objective 3

The Policy Enactment Plan will include the following components:

- A summary of the project
- A review of key findings that provide information on the foundation for the Policy Enactment Plan
- Strategic recommendations for how to influence the three priority audiences, based on each component of the marketing mix:
  - Product
  - Pricing
  - Placement
  - Promotion
- Implantation plan
  - A structure for how to pursue policy enactment and implementation.

### 2.0 Project Summary

Provide a brief summary of the project, touching on the topic area of interest and explaining the coalition's process thus far.

### 3.0 Research Methods

Describe the data collection methods used including type of data collected, manner in which it was collected, recruitment efforts, remuneration, etc.

## 4.0 Beneficiaries

### 4.1 Audience Profile

### 4.2 Marketing Mix: 4Ps

#### 4.2.1 Product Strategy

4.2.1.1 Key findings from research

4.2.1.2 Marketing Questions

#### 4.2.2 Pricing Strategy

4.2.2.1 Key findings from research

4.2.2.2 Marketing Questions

#### 4.2.3 Placement Strategy

4.2.3.1 Key findings from research

4.2.3.2 Marketing Questions

#### 4.2.4 Promotion Strategy

4.2.4.1 Key findings from research

4.2.4.2 Marketing Questions

## 5.0 Stakeholders

### 5.1 Audience Profile

### 5.2 Marketing Mix: 4Ps

#### 5.2.1 Product Strategy

5.2.1.1 Key findings from research

5.2.1.2 Marketing Questions

#### 5.2.2 Pricing Strategy

5.2.2.1 Key findings from research

5.2.2.2 Marketing Questions

#### 5.2.3 Placement Strategy

5.2.3.1 Key findings from research

5.2.3.2 Marketing Questions

#### 5.2.4 Promotion Strategy

5.2.4.1 Key findings from research

5.2.4.2 Marketing Questions

## 6.0 Decision-Makers

### 6.1 Audience Profile

### 6.2 Marketing Mix: 4Ps

#### 6.2.1 Product Strategy

6.2.1.1 Key findings from research

6.2.1.2 Marketing Questions

#### 6.2.2 Pricing Strategy

6.2.2.1 Key findings from research

6.2.2.2 Marketing Questions

#### 6.2.3 Placement Strategy

6.2.3.1 Key findings from research

6.2.3.2 Marketing Questions

#### 6.2.4 Promotion Strategy

6.2.4.1 Key findings from research

6.2.4.2 Marketing Questions

## Appendix A: Policy Enactment Plan Components and Related Marketing Questions

- **Audience profile** for key beneficiaries, stakeholders, and decision-makers to which the coalition will give greatest priority in their advocacy activities. For each key priority audience, develop a composite profile that includes the following:
  - Key demographics
  - Interests and values aligned with your policy goals
  - Possible benefits to supporting the policy
  - Barriers to supporting the policy
  - Attitudes towards policy related public health issue
  - A typical day in the life of the specific audience segment
  
- **Positioning Statement** (or framing the policy):
  - How should the policy be packaged to give it a specific meaning, while discounting competing views?
  - How can it be positioned to connect the issue to people's values and influence how they interpret facts – who they blame for the problem, who they think is responsible for fixing the problem, and the types of solutions that seem most reasonable?
  - What values, metaphors, symbols, messengers, pictures, or stories should be used to convey this position/frame in a powerful, memorable way?
  
- **Product strategy:**
  - How should the policy be modified or structured to garner support and minimize resistance from priority audiences?
  - What incentives could be added to make it more acceptable or attractive?
  - Can a default option be selected that will increase compliance with the desired behavior?
  - What do audience groups value most that the policy can provide them?
  - What are the core benefits that this policy offers each audience that can be used to garner their support?

- **Pricing strategy:**
  - How can perceived costs or objections be minimized or made acceptable to priority audiences?
  
- **Placement strategy:**
  - What organizations, leaders, or other partners can be enlisted to persuade decision makers to adopt the policy?
  - Where and when should decision makers be engaged?
  
- **Promotional strategy:**
  - What activities can be used to get the policy issue on the media agenda?
  - What information channels should be used to communicate with beneficiaries and other priority audiences?
  - What promotional activities should the coalition sponsor?